



## **What's in YOUR Federal Retirement Wallet? Training (Virtual)**

### **AGENDA**

#### **Track 2 Pre-Retirement and Beyond**

#### **Day 1 Tuesday, September 12, 2023**

#### **9:00 am-4:30 pm Central Time (CT)**

##### **Morning Sessions – Virtual**

9:00 am-10:30 am      TSP: Preparing for Separation/Retirement  
Stewart Kaplan, Federal Retirement Thrift Investment Board (TSP)

Link: <https://opm.zoomgov.com/j/1611476704?pwd=YmViQ1NwNkcvQytHSm5mQTI2YlFyQT09>

10:30 am-10:45 am      Break

10:45 am-12:00 pm      TSP: Preparing for Separation/Retirement continued  
Stewart Kaplan, Federal Retirement Thrift Investment Board (TSP)

Link: <https://opm.zoomgov.com/j/1611476704?pwd=YmViQ1NwNkcvQytHSm5mQTI2YlFyQT09>

11:30 am-1:00 pm      *Lunch on Your Own*

##### **Afternoon Sessions – Virtual**

1:00 pm-2:30 pm      **Federal Employees Retirement System (FERS) Overview** – All Tracks  
JoAnna Spicer, U.S. Office of Personnel Management (OPM)

Link:  
<https://opm.zoomgov.com/j/1613583698?pwd=aUlsZW96cGNkbnRkeGMydHFYb2lWUT09#success>

2:30 pm-2:45 pm      *Break*

2:45 pm-4:00 pm      **Financial Retirement Literacy for Feds** – All Tracks  
Victoria Prescott, U.S. Securities and Exchange Commission (SEC)

Link:  
<https://opm.zoomgov.com/j/1613583698?pwd=aUlsZW96cGNkbnRkeGMydHFYb2lWUT09#success>

4:00 pm-4:30 pm      **Optional: FERS Q&A Session**  
JoAnna Spicer, U.S. Office of Personnel Management (OPM)

Link:  
<https://opm.zoomgov.com/j/1613583698?pwd=aUlsZW96cGNkbnRkeGMydHFYb2lWUT09#success>

4:30 pm      Adjourn



## What's in YOUR Federal Retirement Wallet? Training (Virtual)

### AGENDA

#### Track 2 Pre-Retirement and Beyond Day 2 Wednesday, September 13, 2023 9:00 am-3:30 pm Central Time (CT)

##### Morning Sessions – Virtual

9:00 am-10:15 am      **Social Security 101** – All Tracks  
Debbie Sawyer-Smith, Social Security Administration (SSA)

Link: <https://opm.zoomgov.com/j/1611476704?pwd=YmViQ1NwNkcvQytHSm5mQTl2YlFyQT09>

10:15 am-10:30 am      *Break*

10:30 am-11:45 am      **Medicare 101** – All Tracks  
Sylvia S. Gary, U.S. Department of Health and Human Services, Centers for Medicare and Medicaid Services (HHS CMS)

Link: <https://opm.zoomgov.com/j/1611476704?pwd=YmViQ1NwNkcvQytHSm5mQTl2YlFyQT09>

11:45 am-1:00 pm      *Lunch On Your Own*

##### Afternoon Sessions – Virtual

1:00 pm-2:15 pm      **To Retirement and Beyond (5 to 10 years from retiring)**  
Stewart Kaplan, Federal Retirement Thrift Investment Board (TSP)

Link: <https://opm.zoomgov.com/j/1616273073?pwd=U0IFTVI3aUVmNVA3RTh2TkFTNUhPZz09>

2:15 pm-2:30 pm      *Break*

2:30 pm-4:00 pm      **To Retirement and Beyond (5 to 10 years from retiring) continued**  
Stewart Kaplan, Federal Retirement Thrift Investment Board (TSP)

Link: <https://opm.zoomgov.com/j/1616273073?pwd=U0IFTVI3aUVmNVA3RTh2TkFTNUhPZz09>

4:00 pm-4:30 pm      **Optional: TSP Q&A Session:**  
Stewart Kaplan, Federal Retirement Thrift Investment Board (TSP)

Link: <https://opm.zoomgov.com/j/1616273073?pwd=U0IFTVI3aUVmNVA3RTh2TkFTNUhPZz09>

4:30 pm      *Adjourn*